

Unit Assessment
Standard Operating
Procedure

1. **Detailed Assessments** should be conducted at least twice each year at six-month intervals. A third assessment may be valuable when there is a change in unit leadership.

2. **Simple unit assessments** are used when there is routine contact or an update to a specific item of interest. Simple assessments should be corresponded to items in the Unit Service Plan.

Unit Assessment Scoring Matrix

RELATIVE RANKING	SCORE	COLOR	DEFINITION
<i>HIGH</i>	5	<i>GREEN</i>	<i>NEARLY AN IDEAL SITUATION</i>
<i>MEDIUM-HIGH</i>	4	<i>LIME</i>	<i>MAKING PROGRESS TOWARDS THE IDEAL UNIT</i>
<i>MEDIUM</i>	3	<i>YELLOW</i>	<i>TYPICAL UNIT; COULD BE IMPROVED</i>
<i>MEDIUM-LOW</i>	2	<i>ORANGE</i>	<i>NEEDS IMPROVEMENT; WATCH CAREFULLY</i>
<i>LOW</i>	1	<i>RED</i>	<i>WEAK SITUATION; NEEDS IMMEDIATE ACTION</i>

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3. **Detailed Assessments.**

a. Each unit will have a detailed assessment complete in the month of October and April. Commissioner will begin coordination with the Key 3 two months prior to the assessment month.

b. The unit commissioner will:

- 1) Schedule the meeting through Commissioner Tools in scouting.org.
- 2) Review the previous detailed and simple assessments with comments.

3) Fill out the data that is available on the unit assessment form prior to the meeting. Those areas include membership, advancement, and number of leaders trained/untrained.

4) Request the Key 3 provide the following information during the face-to-face session: annual training plan, last six months of their budget, unit roster, and JTE progress.

5) Following the face-to-face the unit commissioner will enter all their findings into scouting.org and email the unit a copy of the assessment. Ensure comments are detailed for every category i.e., 10 of 15 Scouts transitioned, 3 of 15 eligible attended Spartan Camp.

6) If needed, the unit commissioner will create a unit service plan and set a reasonable date to follow up on the plan.

7) Notify the District Commissioner of any immediate concerns.

c. The scoring matrix: The top row will be assessed as Five, High, Nearly Ideal. The remaining rows will follow the assessment in descending order; Four, Three, Two, and One.

Training and Membership	Planning and Budget	Membership	Program	Leadership	Other
Fully Trained	Has an annual plan based of JTE. Has six or more committee meeting a year. Includes Den Leaders in planning. Participates in all three Council fundraisers.	56-100 Scouts Has a recruitment plan. Re-charters 75% of youth. 25-40 Scouts BSA	Advances 75% of Cubs in one year. Earns the Summertime Pack Activity award. Offers five or more outdoor activities or field trips. Troops receive five Webelos into the Troop. Completes four or more service projects and enters hours. For Packs have 75% attend a day or resident camp. Troops conduct 9 short term campouts. Conduct regular weekly meetings.	Have trained and engaged leaders at all levels. All leaders are required to have youth protection training. The pack is proactive in recruiting sufficient leaders. Active Troop committee members have completed position specific training and at least one person has attended an advanced training course involving a total of at least five days.	90% of Scouts in attendance. All Scouts in BSA uniform. Unit striving for Gold on JTE. Patrol Method is being used.

Training and Membership	Planning and Budget	Membership	Program	Leadership	Other
Needs Council Provided Training. I.e., BALOO or IOLS	Has a six-month training plan. Planning includes CM and DLs. Participates in two council fundraisers.	45-55 Scouts Has a recruitment plan. Re-charters 65% of youth 16-25 Scouts BSA	Advances 60% of Cubs in one year. Earns the summertime pack activity. Offers four or more outdoor activities or field trips. Troops receive two Webelos into the Troop. Completes three or more service projects and enters hours. For Packs have 50% attend a day or resident camp. Troops conduct 7 short term campouts. Conduct regular weekly meetings.	Scoutmaster and 60% of assistants or Cubmaster and Den Leaders have completed position-specific training or, if new, will complete within three months of joining.	85% of Scouts in attendance. All Scouts in BSA uniform. Unit striving for Silver on JTE. Patrol Method is being used.
Partially Trained Has three months to complete from date of application.	Plans Quarterly training. Includes CM. Participates in one Council fundraiser.	30-45 Scouts Has a recruitment plan. Re-charters 60% of youth 8-15 Scouts BSA	Advances 50% of Cubs in one year. Offers three or more outdoor activities or field trips. Troops holds two activities for Webelos. Completes three or more service projects and enters hours. For Packs have 35% attend a day or resident camp. Troops conduct 4 short term campouts. Conduct regular bi-weekly meetings.	Scoutmaster or an assistant Scoutmaster or Cubmaster or assistant Cubmaster has completed position-specific training.	80% of Scouts in attendance. All Scouts in BSA uniform. Unit striving for Silver on JTE.
Expired YPT	Plans monthly.	16-30 Cub Scouts 6-8 Scouts BSA Partial recruitment needs assistance.	Does not submit advancements. Does not award Scouts in a timely matter. Participates in 1 to 2 outdoor activities.	Unit has lack of trained leaders.	60% of Scouts in attendance. No structure to opening and closing the meeting. Issues with the Key 3 or leadership.
Untrained	Does not have a plan.	10-15 Cub Scouts 1-5 Scouts BSA No recruitment plans.	Does not record advancements. Does not hold PLC meetings. Does not attend campouts or resident camps.	Unit does not have trained leaders or Committee members.	Unit not Meeting

d. Once the unit commissioner has identified all units' strengths or weaknesses, they will ensure that the unit is assisted in maintaining or correcting those areas.

4. **Simple Assessments.**

a. Each Unit and or District Commissioner should strive to contact their units monthly and enter that contact into Commissioner Tools.

b. Any Commissioner may report unit contacts to each other in order to enter a simple assessment.

5. **Roundtable Commissioner.**

a. The Roundtable Commissioner is overall responsible for monthly District Roundtables.

b. The Roundtable Commissioner will ensure there are sign in sheets for both Troops, Packs, Crews, and Post.

c. The Roundtable Commissioner will enter the agenda and number of those in attendance within two days following the monthly roundtable.

d. Each January those units with the highest attendance will be recognized for the previous year of attendance.

6. **District Commissioner**

a. Supervise the activities of the unit commissioner staff and preside at regular meetings of assistant district commissioners, roundtable commissioners and unit commissioners in the district.

b. Lead efforts to recruit an adequate commissioner staff to provide continuing and effective commissioner service for each unit.

c. Provide a year-round training program for commissioners in the district.

d. Maintain the standards of the Boy Scouts of America, uphold national policies, promote good uniforming, and lead efforts to hold regular roundtable programs in the district.

e. Be concerned with proper recognition of unit leaders. Maintain their morale, periodically reporting unit conditions to the District Committee.

f. Maintain a good working relationship with the district executive.

g. Maintain procedures to assure maximum on-time unit charter renewal in the district.